

Quilter Cheviot is a market-leading specialist in investment management. We focus primarily on structuring and managing bespoke discretionary portfolios for private clients, charities, trusts, pension funds and intermediaries.

## WHY QUILTER CHEVIOT

- We are one of the largest investment management firms.
- With over €24.2bn\* funds under management we have institutional buying power, reducing costs deducted from clients' portfolios.
- Our investment managers have an average of 19 years' investment experience.
- With an office in Dublin, London and a network of regional offices throughout the UK and Jersey, we are ideally placed to provide a local and personal approach.
- We are regulated by the Central Bank of Ireland and the Financial Conduct Authority.
- All client money is held in pooled client designated accounts with leading UK clearing banks, conforming to FCA rules and standard practice among leading investment houses. This means clients' assets remain the property of the client.

## PRODUCTS AND SERVICES

- Our core Discretionary Portfolio Service (DPS) provides individually tailored portfolios for our clients that meet their investment objectives and personal risk requirements.
- We have a strong emphasis on research and analysis, specialising in innovative and well researched investment ideas. This means clients can be confident that all monitored investments held in their portfolios are fully researched and have been subject to due diligence.
- Our services offer exposure to a broad range of asset classes and global investments, ensuring clients' portfolios are appropriately diversified.

## WORKING WITH FINANCIAL ADVISERS

- Our regional development managers and investment managers work closely with financial advisers, recognising that a client's portfolio may form only part of an overall financial planning strategy.
- We do not divide the roles of relationship and investment manager; clients and their advisers will always speak directly to the person making the investment decisions.
- We provide clear, regular and comprehensive reports to keep clients and their advisers fully informed about the progress and structure of their portfolio.
- We regard benchmarking as an integral part of portfolio management and thus subscribe to independent industry performance surveys, most notably Asset Risk Consultants, Defaqto and Enhance.

## QUILTER CHEVIOT

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\*As at 30 June 2015

**Investors should remember that the value of investments, and the income from them, can go down as well as up and that past performance is no guarantee of future returns. You may not recover what you invest.**

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